

Session 4: Module 3 - Demographics - Part 2	
FINAL	
Description	Text
Introduction	Welcome to M-SPIRIT Session 4, Module 3 , of the M-SPIRIT Required Online Training presented by the Montana Department of Public Health and Human Services WIC Program.
Start	Demographics, Part 2.
Reminder	When using M-SPIRIT, continue to keep in mind that the system was developed as a tool to be shared by many states with differing policies and practices.
	A by-product of this kind of collaboration is that there are some fields we don't require that are required by the system.
	The Demographics tabs have some of these fields.
<addhx>	We are still looking at Delhi's Demographics screen in the CGS.
	Let's continue with our review of Demographics starting with the Address History button.
	The Address History button opens a window that displays any previous addresses saved for the participant.
	During the break between modules, we changed Delhi's address from 123 Garden Street to 456 Meadow Drive.
	Let's click the Address History button to see what displays.
<addhx1>	The Household History grid will display any previous residential and/or mailing addresses for the household.
	Using the scroll bar we can see what other information is displayed.
<addhx2>	The staff ID of the staff person that made the change, along with the date and time the change was made, are also displayed.
	Click the OK button to exit the window.
<copy>	The Copy Demographics button allows you to copy certain member-level fields from one household member to the current member's record.
	Click the Copy Demographics button.
<copy1>	These are fields that you will see when we review the AdditionalInfo1 and AdditionalInfo2 tabs.
	They are often the same for most household members but could potentially be different, which is why they are saved for the member and not for the household.
	All Household Members will display in the grid.
	Information populates below based on the field values saved for the member highlighted in the grid.
	Go ahead and click on Rosie...

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<copy2>	...and notice how the information changes.
	In order to copy the selected member's information, you must click the Replace Existing Information checkbox.
	If you click OK before doing so, the information will not copy from one record to another.
	Go ahead and click the Replace Existing Information checkbox.
<copy3>	At this point, if we were to click the OK button, all of the fields with information below would be copied into Delhi's record.
	Instead of clicking OK though, let's click Cancel and take a look at Delhi's AdditionalInfo tabs without first copying Rosie's information.
<addinfo>	So, let's take a look at the AdditionalInfo1 tab. Go ahead and click on the tab.
<addinfo1>	Household Smoking, as the name implies, applies to all members of the household.
	Since it must be re-assessed at each certification, its previously selected value is cleared in the CGS.
	It is also required if any changes are made to Demographics in the Participant Folder and the field is blank.
	Click on the Household Smoking drop-down arrow.
<addinfo2>	You can indicate if anyone smokes in the participant's home by selecting Yes.
	Let's select Yes.
<addinfo3>	<no script>
<addinfo4>	<no script>
AddInfo	Select Yes if anyone smokes in the participant's home.
	If you select Yes, M-SPIRIT auto-assigns Risk Factor 904 - Environmental Tobacco Smoke Exposure.
<addinfo5>	The TV/Video Viewing field is only enabled for children 2 years and older.
	Let's take a look at a child's AdditionalInfo1 tab.
<addinfo6>	We are now looking at Rosie Flower's AdditionalInfo1 tab. She is 2 1/2 years old.
	Click on the TV/Video Viewing drop-down arrow.

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<addinfo7>	You must select an option that indicates how many hours the child spends in front of a TV, watching videos or in front of a computer each day.
	Notice that None and Unknown are both available options.
	Since, like Household Smoking, it must be re-assessed at each certification, its previously selected value is also cleared in the CGS.
<addinfo8>	And, again, like Household Smoking, it is required if any changes are made to Demographics in the Participant Folder and the field is blank.
<addinfo9>	Back in Delhi's CGS.
	There are 6 Local Use Questions that allow your local agency to collect additional information about participants.
	However, each question can be specific to WIC Category.
	Creation and maintenance of the Local Use Questions must be arranged through the WIC State Office.
	If your Local Agency requires that these questions be answered, this would be enforced by Local Agency Policy only, since M-SPIRIT does not require that Local Use Questions be answered.
<addinfo10>	There are also 6 State Use Questions that allow the State to collect additional information about participants.
	Currently, the State is not using this functionality.
	However, like the Local Use Questions, if they were enabled, answering would be enforced by policy only, since M-SPIRIT does not require that they be answered.
<addinfo11>	How Heard about WIC is required in Prescreening and saved at a household level.
	Like Household Smoking and TV/Video Viewing, it is required if any changes are made to Demographics in the Participant Folder and the field is blank.
<addinfo 12a>	Select a Hardship when the applicant is exempt from the physical presence certification requirement.
	The Hardship list will be updated by the State Office in the near future to more accurately reflect the physical presence exemptions.
	Documentation of Hardship, per State Plan Chapter 5, Policy 5-11, Section IV.c, must be scanned into the Participant Folder.
	Remember, although the applicant may be exempt from physical presence, all necessary information for certification is still required.

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<addinfo 12b>	Select a Disability for applicants whose impairment may result in modifications to clinic policy, practices or procedures to accommodate the applicant.
	Click on the Disability drop-down arrow to display the choices.
<addinfo 12c>	Delhi does not have a disability, so click on the down-arrow to collapse the list.
<addinfo 13>	M-SPIRIT collects the type of insurance a participant currently has in the Insurance Type field.
	Click the Insurance Type drop-down arrow.
<addinfo14>	The value is saved individually for each member of the household.
<addinfo15>	The Type of Medical Home is also saved at a member level.
	Click the drop-down arrow to open the list.
<addinfo16>	The list contains statewide, generic clinic types.
	Choose the type of clinic where the applicant usually receives health care.
	If the participant doesn't have a clinic, the option of None is available.
<addinfo22>	The Medical Home field is not used by Montana and is never enabled.
	Click on the AdditionalInfo2 tab.
<addinfo23>	The Household Language(s) section has the same fields as we saw in the Applicant Prescreening.
<addinfo24>	The Additional Information header varies depending on the participant's WIC Category.
	For women, it is labeled Women Additional Information and you are collecting information for her.
<addinfo25>	If we take a look at an infant's or child's AdditionalInfo2 tab...
	...the section is labeled Authorized Representative Additional Information and you are collecting this information for the primary caregiver.
<addinfo26>	Back in a woman's record again, Marital Status is required for all participants regardless of WIC Category.
	Click on the drop-down arrow to see your choices
<addinfo27>	You may choose Decline if the applicant is uncomfortable sharing her marital status.
	Delhi is married, so select Married.
<addinfo 28>	<no script>

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<addinfo29>	Once this has been selected for a participant, you won't have to complete this field again.
	The Education Level is also required by the system.
	Montana collects this information for all women applicants and for infants' and childrens' primary authorized representative.
	Click on the drop-down arrow.
<addinfo30>	...and we'll take a look at the options available.
<addinfo32>	Select the highest education level completed, which is used for reporting purposes.
	Dehli completed high school. Select the 12th Grade or GED option.
<addinfo33>	<no script>
<addinfo34>	Again, let's go look at the child Rosie's AdditionalInfo2 tab.
<addinfo35>	Choose the Education Level for the primary Authorized Representative.
	Click the drop-down arrow to open the list.
<addinfo36>	Remember, for Infants and Children, this is the Education Level of the Authorized Representative.
	In this case, select 12 th Grade OR GED.
<addinfo37>	<no script>
<addinfo39>	Since we are in a child's AdditionalInfo2 tab, we will mention that the Register to Vote field is never enabled for infants or children.
<addinfo40>	The Register to Vote field is enabled for all women 18 and older.
	It is enabled for all women 18 and older.
	Click the drop-down arrow.
<addinfo41>	If you supplied the applicant with voter registration information, select Yes.
	If the applicant is not registered and refuses voter registration information, select No.
	If the applicant is currently a registered voter, select Already Registered.
	Delhi is a registered voter, so select Already Registered.

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<addinfo42>	<no script>
<addinfo43>	All of the values in this section will remain once selected. You only have to complete each field once for each record.
<addinfo44>	The Last and First fields under Authorized Representative Name are required.
	If the participant is a woman, M-SPIRIT will auto-populate these fields with her name.
	The Alternate Representative/Proxy 1 and 2 Names are optional.
<addinfo45>	All of these fields: Marital Status, Education Level, and Representative Names are saved at the member level or individually for each record.
	However, they are also all fields that can be copied using the Copy Demographics button on the main Demographics screen.
<addinfo46>	The last section on the AdditionalInfo2 tab displays information about the current status of the participant's record.
	It includes the Application Date, or the date the participant was prescreened or added to the system;
	the Termination Reason and Date, which indicates if the participant's most recent cert was terminated by either the system during End-of-Day by or by a user;
	the Ineligibility date and reason if the participant was determined ineligible during their most recent certification attempt;
	and the participant's most recent calculated priority, which the system immediately starts calculating during the CGS.
	Since we've completed the Demographics screens, click the OK button to save our changes.
<addinfo47>	Did you remember that we haven't completed income yet?
	Did you notice that we did NOT get a message indicating we couldn't exit Demographics without completing income?
	Lastly, did you notice that we received a checkmark for Demographics despite not having documented income?
	M-SPIRIT will require income documentation to complete the CGS.
	...but it is NOT part of the validation process to ensure you have completed all required fields before you exit Demographics.
	However, it is part of the CGS completion validation process.

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	The "Event Log - Review Certification for Errors" icon displays all required sections that have yet to be completed at any time during the CGS process.
<addinfo48>	Click the Event Log - Review Certification for Errors icon...
<addinfo49>	...and the Event Log opens indicating that the income contact must still be completed.
	Click the Close button to exit.
<addinfo50>	<no script>
Questions	Do you have any questions about what we just reviewed? If so, please submit them via the M-SPIRIT Frequently Asked Questions forum on the Montana WIC website.